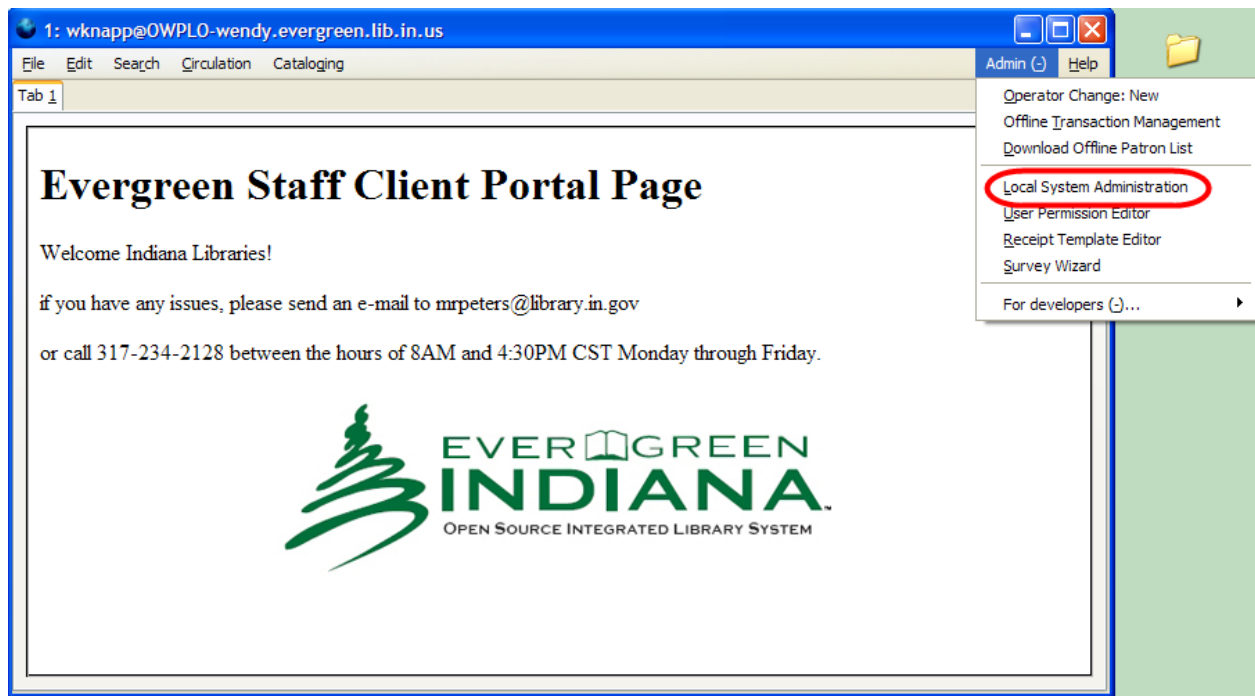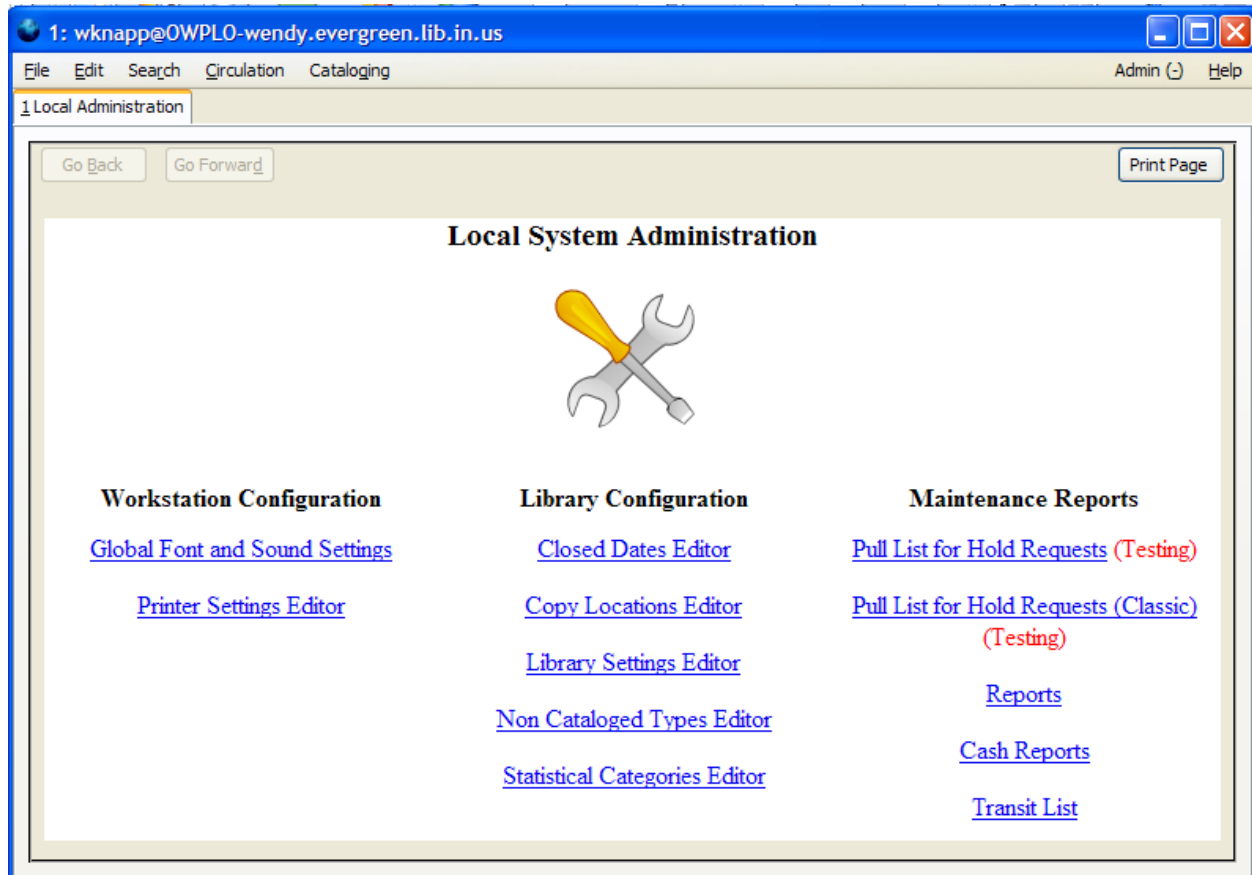# Admin Training



Reports are an Admin Function

You can run the reports from the Local System Administration

Some of the most common reports are listed under Maintenance Reports

**Pull List for Hold Requests**

**Pull List for Hold Requests (Classic)**

Pull Lists are automatically associated with the library with which your workstation is registered.   You can choose the format you prefer.  Most libraries prefer the "Classic" format because they like the way it prints.

**Cash Reports**

You can select the time frame

- so if you make a deposit on Monday for Friday, Saturday, and Sunday you can select the three days
- then Tuesday, you just select Monday's date

**Transit List**

You can select to see either the item on their way to your library (Transit to)



Or you can select the items your library has sent out (Transit From)

Other Reports (including Overdue Notices and Circulation Reports) can be run by selecting **Maintenance Reports →Reports**

The first thing you'll need to do is create subfolders for your library

The choices you must make are

- Folder Name

- Share or Do Not Share

- If you choose to Share, with whom

It's a good rule of thumb to _____ your reports.  Other libraries in Evergreen Indiana will be sharing their reports to benefit the consortium.  It's also easier for the Evergreen Helpdesk to troubleshoot if you've shared your reports.  It's possible that your library will never have to write a new report.

You'll create a subfolder in both Reports and Templates

Within the **Shared Folders** Menu, there are dozens of reports you can use to run reports specific to your library.   Creating reports from templates requires only that you select certain data options.  You can then print or email the report.  If you choose to email the report to another staff member, they will receive a hyperlink they can use to access the report with their Evergreen Indiana Log in.

Open the **Templates →admin→EI_Templates**

The categories available include

- Holds Reports

- Customer Reports

- Item Reports

- Overdue Notice Templates

- Bibliographic Reports

- Circulation Reports

- EI Testing (we won't deal with this category)

- Bills Reports

We'll look at a couple of templates and create reports for our library from these, starting with Customer Reports

**Customer Reports**



Note that the Template Name and description provide a lot of detail for what kind of report you'll get.

When you select the template you want to use, you'll **Create a new report from selected template**

The first required field is the report name.



Next, though less obvious, you have to select the **folder to store this report definition**.  When you have selected the folder, it will appear as the bolded Selected Folder

Next we choose the parameters (the date and our library)



And we'll choose the Output options

- For all reports, it's a good idea to choose the_____ output
- For the training, go ahead and run the report ASAP, so we can get the results
- If you can access your email, go ahead and send the report to yourself
- And choose the Output subfolder you created

When you **Save** the **Report**, if you filled in all the required fields, you'll get the following notification
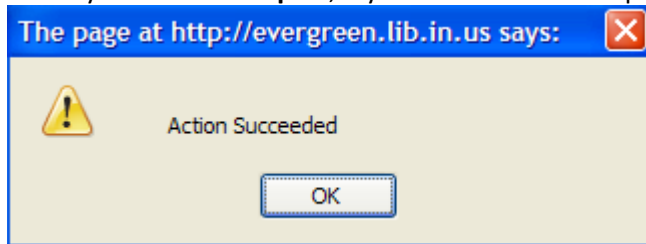
Clicking OK will take you back to the template list.  You'll need to navigate to the Output folder you created earlier, and chose as **the folder to store this report's output**.

You'll see the bar graph, because we left that option checked.  Then you can view the tabular output (and see that in the Evergreen window) or the CSV output, so you can sort and reformat.  Click the Excel Output.



You could open the output spreadsheet or save it.  A sample of the output report follows:

Next, choose the Circulation Templates from the EI Admin template shared folder.

- Choose Monthly Circ by Circulation Modifier
- Name the report (use training and the date in the title)
- Choose the folder to store this report definition (the one you created)
- In the User Parameters, you will add the library and choose a date
- Select the Output Options (CSV, HTML, and Bar Charts) checked
- For this training, run the report ASAP
- Send the email notification to yourself.
- And choose the folder to store this report's output (the one you created)
- Save the Report

When you see Action Succeeded, you'll be redirected to the template page

- Navigate to your Output subfolder
- Select the Circ Modifier report you just created
- Next to **View Report Output**, click **Submit**

When you see the bar chart, you can select the tabular output to view that this time.

Remember **CRTL + W** closes tabs

**Check your email** to see that you have two emails (one for each report created).  Each one will have a URL which you can use to access the reports.
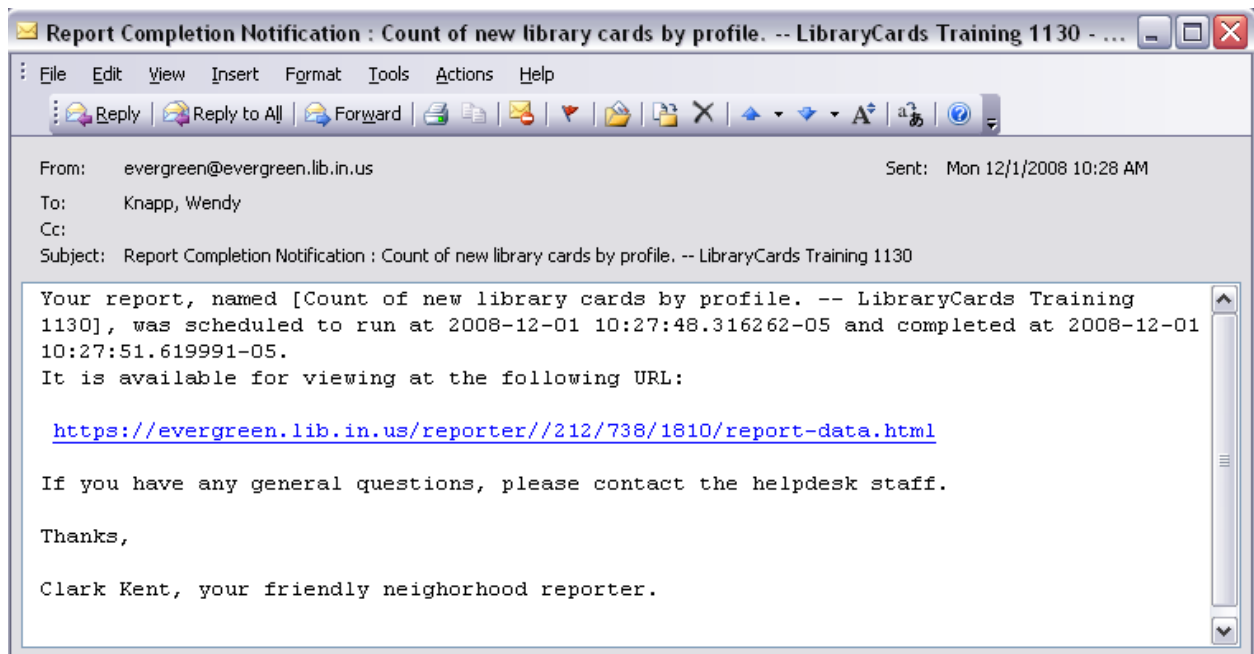
# Also in the Local System Admin

**Closed Dates Editor**
You can set single dates that the library is closed (most holidays)
You can set multi dates that the library is closed (for a remodel)
You can set details (if the library will open late or close early due to weather)

**Printer Settings Editor**
Check your default printer (stays with the computer, not the user logged in)
Print the test page (use the Cute PDF writer or other image software for training)

# Another Admin Function

## Receipt Template Editor



**Let's add some information to the Checkout Receipt:**
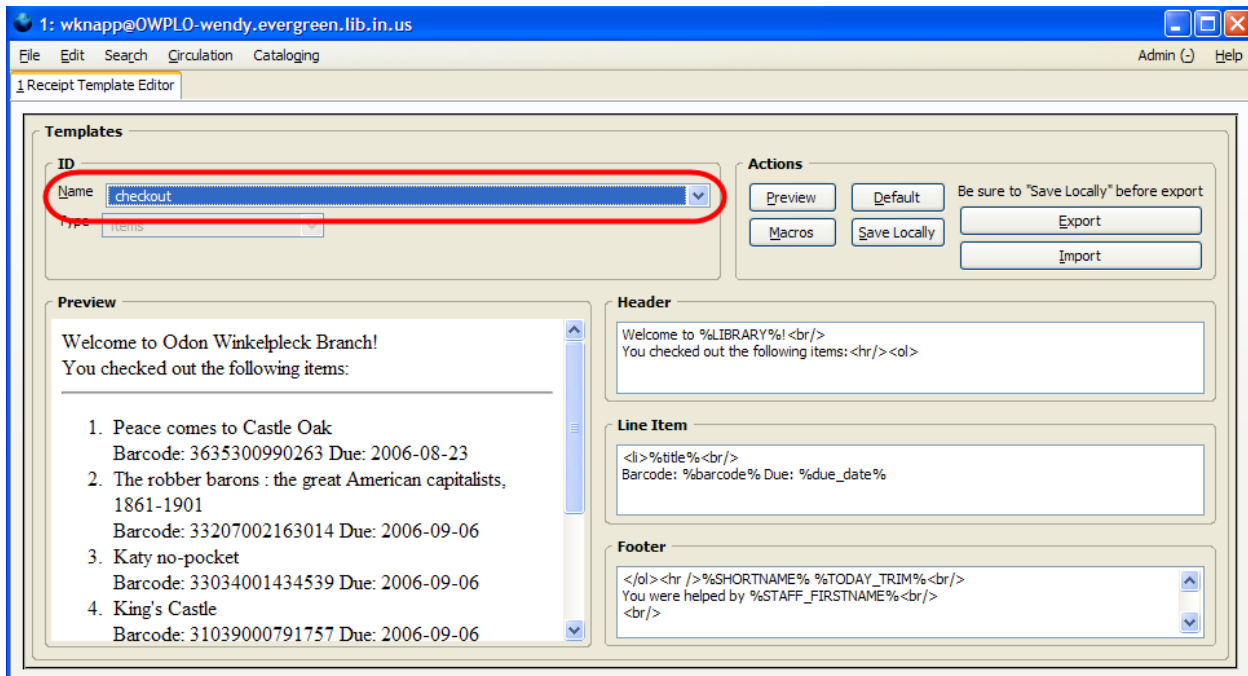
**To the footer add closing dates for an upcoming holiday**



**View the change in the preview**

**To add this to each computer that will check out to patrons, first choose Save Locally**



**You can then Export the file to a flash drive**

**You can log onto each computer that does checkouts, go back to the Admin→Receipt Template Editor, and Import the file you saved to the flash drive**

# The reports in Evergreen Indiana Templates

## Holds:

### Hold count by date range
Count of filled holds on titles by pick up library.  Display of pickup library, number of holds without canceled holds.

### Hold Based Purchase Alert New
Count of unfilled holds on titles by pick up library.  Display of pickup library, title, author, number of holds, number of copies library owns, and date first hold was placed.

### Cleans Holds Shelf - HMMPL (clone)
Determines cancelled holds from previous  day.  This report will also include staff cancelled holds.
***This report actually gives you the holds that have been on the shelf for 7 days, and no one has picked them up.***

### Unfilled Holds(test)
List of patrons with unfilled holds by pick up library and hold placement date range.  Display of pickup library, title, author, patron barcode, patron name, hold type, and hold placement date.

## Customer:

### List of items chosen by owning library, Item copy status, Multiple fine stop reasons
A list of items chosen by owning library, Item copy status, multiple fine stop reasons.  Output is library name, call number, title, item barcode, shelving location, status, lasted edited date, customer first and last name, customer barcode.  Commonly used for Claims returned

### Total Users by Library
Count of Users at selected libraries.

### Count of new library cards by profile.
List of new card per specified date range.

### List Users by Profile Group
List of Users at selected libraries, broken down by Profile Group, Library Card, Name, Address and Expiration Date.

## Item:

**Count of Items added in the last X months**
Count of Items by added in the last X months.  Display of library, circ modifier and count.

**Count of Items Deleted in the last X months**
Count of Items by deleted after X days ago.  Display of library,  circ modifier and count.

**List item with a Total Use Count by Item Creation Date by entering the multi-barcode of the item HMMP**
List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by multi-barcode.  This is for use counts circulated from Evergreen and SIRSI
***Most libraries will not need this report.***

**Total Items Count by Library**
Count of total items at selected library

**Items received for hold by Date**
Count of Items received to other libraries to fulfill a hold by date.

**Items transited to other libraries for hold by Date**
Count of Items transited to other libraries to fulfill a hold by date.

**List of Items added in the last X days**
List of Items by added after X days ago.  Display of library, deletion date, title, author, call number, barcode, status. location and circ modifier

**List of Items Deleted in the last X days**
List of Items by deleted after X days ago.  Display of library, deletion date, title, author, call number, barcode and circ modifier

**List item with a Total Use Count by Item Creation Date by entering the barcode of the item HMMPL**
List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by barcode.  This is for use counts circulated from Evergreen and SIRSI
***Most libraries will not need this report.***

# Overdue Notice Templates:

**Long Overdues "Between" dates and Circulating Library**
Used for creating 28 and 45 day overdue mail merge

# Bib Templates:

**Total Bib\Titles Count by Library**
Count of total Bib\titles at selected library

## Circulation Templates:

**Patron by Patron Items Out Count**
Count of items out by patron barcode, Patron Home Library, Circulating Library.  Filtered by Library Org Unit.  (CSV Output Reccomended)

**Monthly Total Circ by Profile**
Count of circulations at selected libraries by month by profile.

**Total Circ date**
Count of circulations at selected libraries by selected date.

**Monthly Circ by Circulation Modifier and Shelving Location**
Count of circulations at selected libraries by month, broken down by circ modifier and Shelving Location.

**Monthly Total Circ by Circulation**
Count of circulations at selected libraries by month.

**Monthly Circ by Circulation Modifier**
Count of circulations at selected libraries by month, broken down by circ modifier.

## Bills Templates:

**Monthly Detailed Payments Received**
Monthly detailed cash report by payment per transaction from X number of months ago.  Note:  this does not include forgive, work, voids, and future goods payments.

**Detailed Payments Received by date range**
Detailed cash report by payment per transaction within date range.  Note:  this does not include forgive, work, voids, and future goods payments.

# A common error

**If you lose your network connection (training on a wireless network, this can happen), you'll see the following errors:**